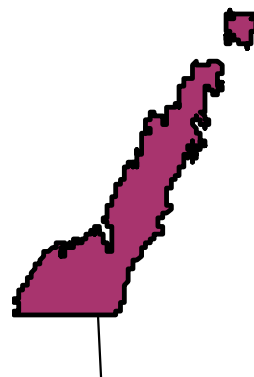
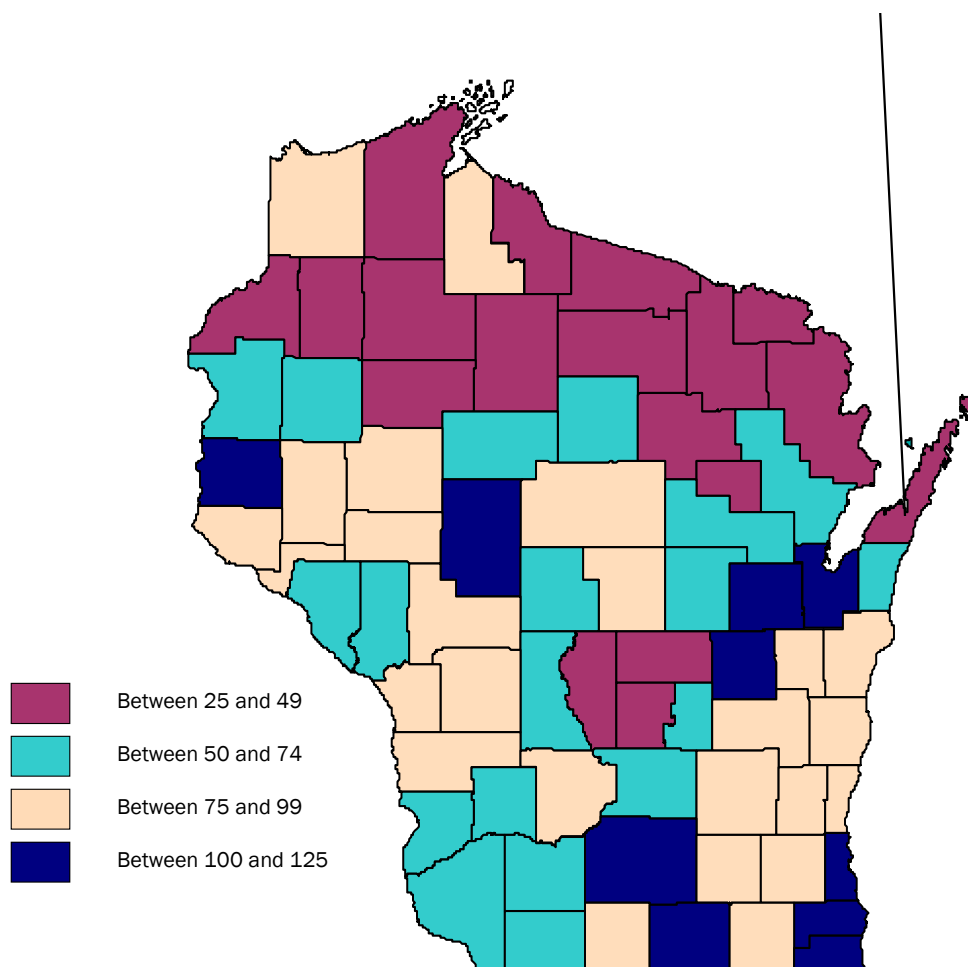


Door County Workforce Profile



The number of residents aged 25-29 years for every
100 residents aged 60-64 years in year 2025



Source: Wisconsin Department of Administration, Demographic Services Center and the U.S. Bureau of Census.

For comparison, it is projected that there will be 90 residents aged 25-29 for every 100 residents aged 60-64 in Wisconsin in 2025. Nationally, it is projected that there will be 101 residents aged 25-29 for every 100 residents aged 60-64. In 2003, Wisconsin had 146 residents aged 25-29 for every 100 aged 60-64.



County Population

After growing at a slower rate than the state and nation during the 1990's, Door County's growth rate has exceeded both since 2000. Since that time, county population has increased by 4.1 percent compared to 3.1 percent for Wisconsin and 3.9 percent for the United States. This brings the county's population up to 29,114, an in-

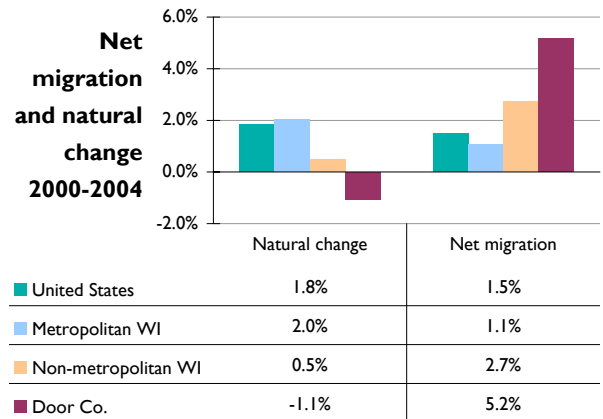
crease of 1,153 residents since 2000. All of the ten largest municipalities in the county had a positive growth rate over the last four years, ranging from 2.7 percent to a high of 10.8 percent in the Town of Egg Harbor. Although it did not have the largest percent increase, the largest actual increase was in the City of Sturgeon Bay, which increased by 259. Factors influencing municipal population growth include quality of life issues, economic vitality and annexation of adjacent areas.

Overall population change in the county comes from two sources. One is natural change, which counts the number of births minus the number of deaths. The other is net migration, which estimates the number of residents moving into the county minus the number moving out of the area. With more deaths than births, Door County's population would shrink without positive net migration, which accounts for all the county's population growth. This trend began before the 1990 Census. Net migration is projected to peak around 2010 and decline through 2030. The excess of deaths over births is projected to grow from 436 in the 2000-2005 period to 1,448 in the 2025-2030 period.

Total Population

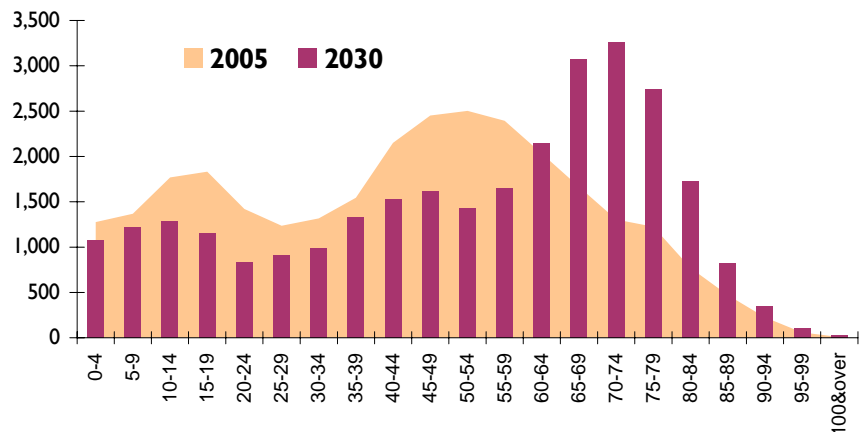
| | April 2000 Census | Jan. 1, 2004 estimate | Numeric change | Percent change |
|-------------------------------|----------------------|--------------------------|-------------------|-------------------|
| United States | 281,421,906 | 292,287,454 | 10,865,548 | 3.9% |
| Wisconsin | 5,363,704 | 5,532,000 | 168,296 | 3.1% |
| Door County | 27,961 | 29,114 | 1,153 | 4.1% |
| Largest Municipalities | | | | |
| Sturgeon Bay, City | 9,437 | 9,696 | 259 | 2.7% |
| Sevastopol, Town | 2,667 | 2,790 | 123 | 4.6% |
| Liberty Grove, Town | 1,858 | 1,958 | 100 | 5.4% |
| Nasewaupee, Town | 1,873 | 1,949 | 76 | 4.1% |
| Egg Harbor, Town | 1,194 | 1,323 | 129 | 10.8% |
| Gardner, Town | 1,197 | 1,234 | 37 | 3.1% |
| Forestville, Town | 1,086 | 1,157 | 71 | 6.5% |
| Gibraltar, Town | 1,063 | 1,156 | 93 | 8.7% |
| Brussels, Town | 1,112 | 1,142 | 30 | 2.7% |
| Baileys Harbor, Town | 1,003 | 1,080 | 77 | 7.7% |

Source: Wis. Dept. of Administration, Demographic Services and U. S. Census Bureau



Source: WI Dept. of Admin., Demographic Services and U. S. Census Bureau

Population by Age Groups in Door County



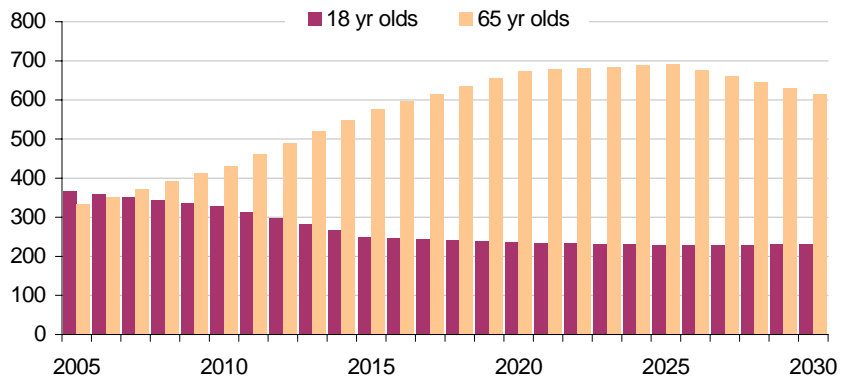
Source: WI Dept. of Administration, Demographic Services

Future Population and Labor Supply

generally have a higher birth rate. The chart on the bottom of the page shows that a large portion of the population is currently middle aged. This is the age that has the highest attachment to the labor force. As time moves on, this group will move into retirement age where labor force attachment is lower. Apart from having lower labor force attachment, this group will also be looking for different services and commodities offering new opportunities to the area. Because of the aging of the county, in-migration plays an important role in the growth of the county.

Because of the older population and low birth rates in the area, it is a just matter of time before the number reaching age 65 each year will exceed the number reaching age 18. This is expected to happen in about three to four years. While it is not necessarily true that workers retire at age 65 or for that matter enter the labor force at age 18, it suggests that the county will not be able to support an expanding economy, as the pool of residents in prime working ages begins to decline without an adequate number of replacement workers.

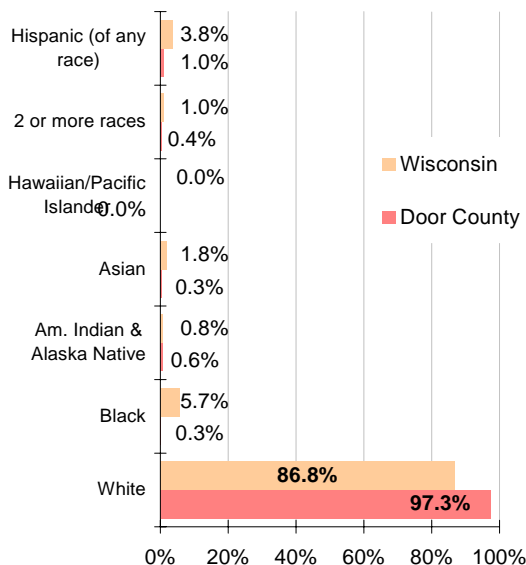
Convergence of 18 & 65 year old population in Door County



Source: WI Dept. of Administration, Demographic Services

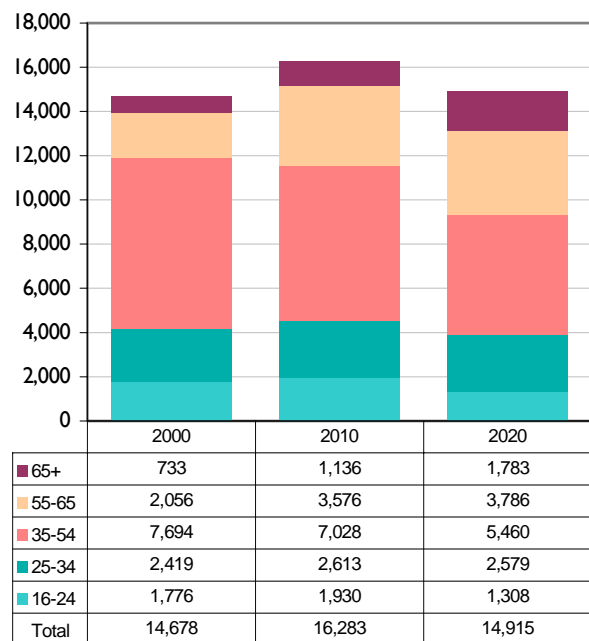
Current trends indicate that over the last 10 to 15 years that labor force participation has increased for the older workers. In many cases they remain on the job for financial, health care or social reasons. There also some who retire, then take a job with less stress and more flexibility than their former job. The extent to which the population participates in the labor force is called the labor force participation rate and it varies by location, age, sex, race, and ethnicity.

Race and ethnic distribution



Source: U.S. Census 2000, SF-3, table P-6

Door County Labor Force Projections by Age



| Decade change | 2000-2010 | 2010-2020 | 2000-2020 |
|---------------|-----------|-----------|-----------|
| Decade change | 6.2% | 10.9% | -8.4% |

Source: DVD, Office of Economic Advisors, August 2004

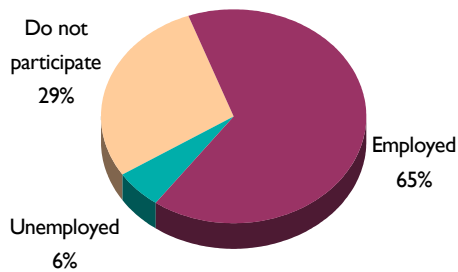
Current Labor Force

Labor force participation represents the share of the population that is 16 years and older that is either employed or unemployed. Participation rates in Wisconsin and the United States in 2003 were 72.9 and 66.3 percent, respectively.

this provides sufficient workers at the present time, as the population ages, more retirees will be included in the category of choosing not to work and labor force participation rates will decline.

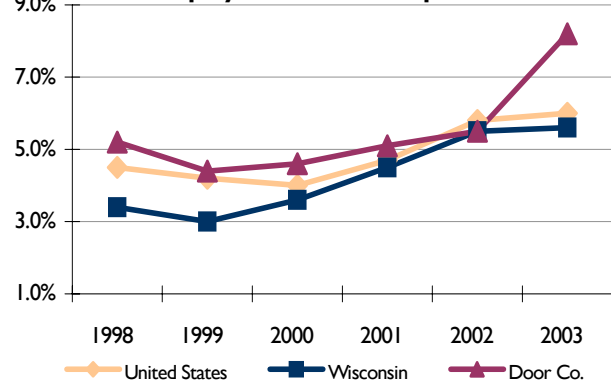
The county's labor force participation rate of 71

Labor force participation in Door County



Source: DWD, Office of Economic Advisors, July 2004

Unemployment Rate Comparison



percent is just below the state rate. Currently 29 percent do not participate in the labor force. This includes some students, individuals who choose not to work including retirees and those not able to work. The rate is relatively high looking at the age of the county's population. While

Door County Civilian Labor Force Data

| | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 |
|-------------------|--------|--------|--------|--------|--------|--------|
| Labor Force | 15,661 | 15,227 | 15,659 | 16,374 | 16,389 | 16,571 |
| Employed | 14,840 | 14,563 | 14,941 | 15,535 | 15,487 | 15,204 |
| Unemployed | 821 | 664 | 718 | 839 | 902 | 1,367 |
| Unemployment Rate | 5.2% | 4.4% | 4.6% | 5.1% | 5.5% | 8.2% |

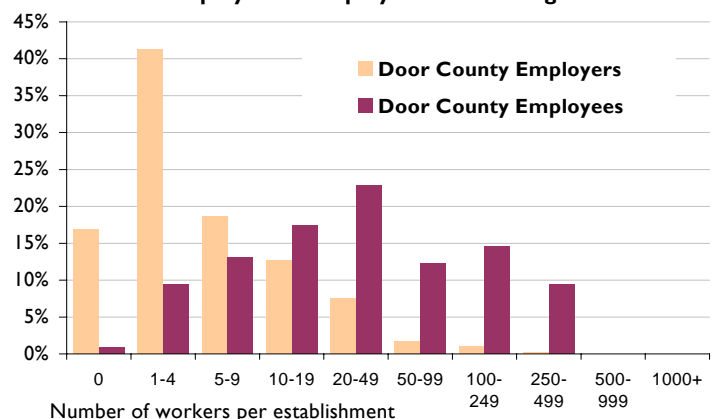
Source: WI DWD, Bur. of Workforce Information, Local Area Unemployment Statistics, 2003

Employers by Size

Over 75 percent of the county's employers have fewer than 10 workers, providing just over 20 percent of the county's jobs. Less than five percent of the employers in the county have over 50 workers. This five percent provides about 35 percent of the county's jobs. The largest portion of workers in the county are employed by employers with 20 to 49 workers.

Although small employers do not provide a high percent of the jobs, these are often the businesses of the future, and may collectively have a faster growth rate than their large counterparts. A healthy community will have a good mix of both large and small firms.

Share of employers & employees in size range in 2003



Source: DWD, Bureau of Workforce Information, Table 221, July 2004

Industry & employers by size

Of the ten largest industries in Door County, it is probably not surprising that the food services and drinking places industry has the greatest number of employees. The industry also has had the greatest numerical growth over the last five years. This is part of the tourism business, which is very important in Door County where there was over 394 million dollars expended in 2003. The county ranked seventh in tourism

dollars in the State of Wisconsin last year.

All of the employers in the county have fewer than 500 workers although this will vary based on the condition of the economy and other factors. The ten largest public and private employers in the county provide 46 percent of the jobs in Door County.

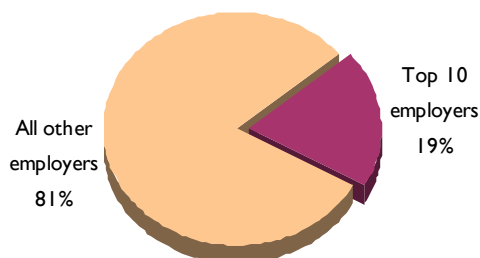
Top 10 Industries in Door County

| Industry | March 2004 | | Numeric Employment Change | |
|--|----------------|------------|---------------------------|------------|
| | Establishments | Employees | 2003-2004 | 1999-2004 |
| Food services & drinking places | 97 | 1,125 | 62 | 232 |
| Educational services | 11 | 811 | 17 | 28 |
| Transportation equipment manufacturing | suppressed | suppressed | not avail. | not avail. |
| Executive, legislative, & gen government | 17 | 594 | 52 | 72 |
| Accommodation | 68 | 581 | -40 | -123 |
| Machinery manufacturing | 6 | 488 | -15 | -63 |
| Specialty trade contractors | 82 | 476 | -19 | 40 |
| Fabricated metal product manufacturing | 11 | 420 | -37 | -115 |
| Hospitals | suppressed | suppressed | not avail. | not avail. |
| Food & beverage stores | 18 | 351 | -10 | -43 |

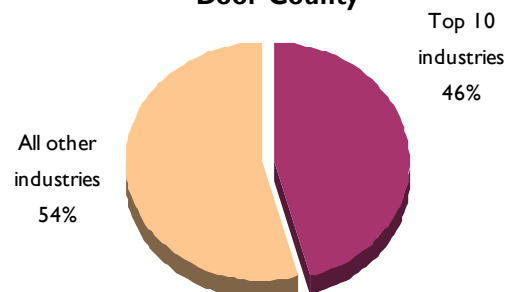
Top 10 Employers in Door County

| Establishment | Product or Service | Size (Dec. 2003) |
|-----------------------------------|---|-------------------|
| Door County Memorial Hospital | General medical and surgical hospitals | 250-499 employees |
| County of Door | Executive and legislative offices, combined | 250-499 employees |
| Hatco Corp. | Other commercial and service machinery mfg. | 250-499 employees |
| School District of Sturgeon Bay | Elementary and secondary schools | 250-499 employees |
| Southern Door Public School | Elementary and secondary schools | 100-249 employees |
| Door County Young Men's Christian | Civic and social organizations | 100-249 employees |
| Baylake Bank | Commercial banking | 100-249 employees |
| Manitowoc Marine Group LLC | Ship building and repairing | 100-249 employees |
| Palmer Johnson Inc. | Boat building | 100-249 employees |
| Wal-Mart Associates Inc. | Discount department stores | 100-249 employees |

Share of Door County jobs with top 10 employers



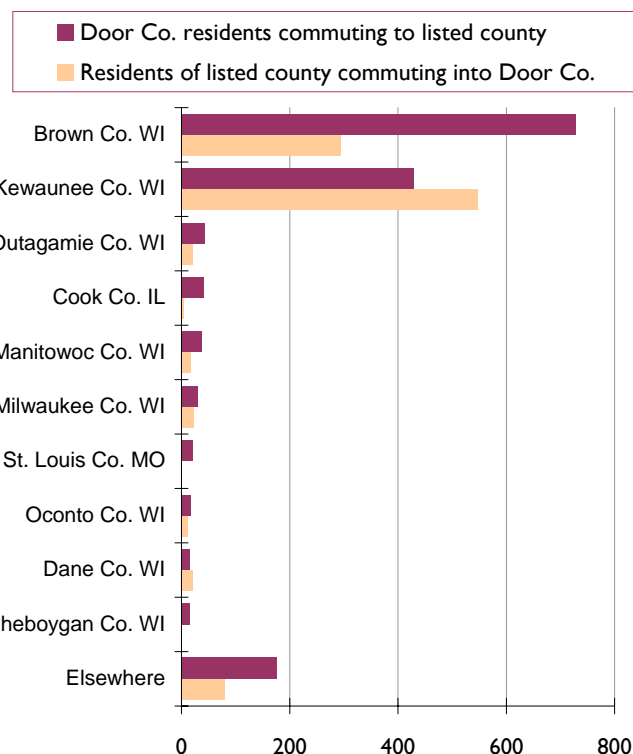
Share of jobs in top 10 industries in Door County



Commuting

When looking at Door County's commuting patterns, there are two things that stand out. One is that the majority of interaction with jobs and workers from other counties is limited primarily to two counties, Brown and Kewaunee; the county's closest neighbors. Although a few workers may commute as much as 100 miles one way, most are probably traveling less than 30 miles.

The other factor is that Door County is an exporter of workers, although it only loses about four percent of its workforce. Approximately 500 more workers leave the county for employment than enter the county. The majority of this loss occurs with Brown County which is a metropolitan statistical area and has a larger economic base with more job opportunities as well as a wider array of occupations. Wages are generally higher in the metropolitan areas than in non-metropolitan areas. Many times workers from the metro areas will move to a non-metro area for quality of life reasons, lower living costs and a greater availability of housing, but still retain their employment in the metro area.



Source: U.S. Census 2000, Special tabulations: Worker Flow Files

Key occupations & wages

The table to the right includes occupations that are common in the area. The list is not all inclusive; for information on additional occupations refer to the Office of Economic Advisors' website: <http://dwd.wisconsin.gov/oea/>. Wage tables are generally guides to what is happening in the local labor market. The surveys are sent to approximately one third of the employers in the state every year.

The survey results help workers evaluate job openings and offers. The results are also useful for employers that are looking to hire new workers and want to know what the "going rate" is. Note the table excludes the top and bottom 25 percent of wages, so there will be instances when the wages will be either above or below those listed on the table.

| Occupation title | Hourly Wages | | | |
|---|--------------|------------------|------------------|------------------|
| | Mean | Percentile | | |
| | | 25 th | 50 th | 75 th |
| Truck drivers, heavy & tractor-trailer | \$15.67 | \$13.60 | \$15.49 | \$17.22 |
| Cashiers | \$7.89 | \$6.49 | \$7.55 | \$8.88 |
| Waiters & waitresses | \$7.62 | \$5.97 | \$6.61 | \$8.13 |
| Retail salespersons | \$9.71 | \$7.41 | \$8.96 | \$10.69 |
| Maids & hskpg. cleaners | \$8.89 | \$7.17 | \$8.56 | \$10.60 |
| Office clerks, general | \$9.17 | \$7.08 | \$8.75 | \$10.90 |
| Nursing aides, orderlies, & attendants | \$9.81 | \$8.60 | \$9.79 | \$11.02 |
| Secretaries, except legal, medical, & executive | \$10.83 | \$8.96 | \$10.49 | \$12.72 |
| Comb. food prep. & serving workers (fast food) | \$7.51 | \$6.18 | \$7.26 | \$8.69 |
| Bookkeeping, accounting, & auditing clerks | \$11.73 | \$9.34 | \$11.19 | \$13.73 |
| Carpenters | \$13.48 | \$10.44 | \$12.98 | \$16.04 |
| Janitors & cleaners, except maids & hskpg. cleaners | \$9.79 | \$7.35 | \$9.09 | \$11.90 |
| Team assemblers | \$12.04 | \$9.15 | \$11.08 | \$14.11 |
| Laborers & freight, stock, & material movers, hand | \$9.60 | \$8.35 | \$9.66 | \$10.75 |
| Registered nurses | \$23.30 | \$19.19 | \$21.92 | \$26.27 |
| Bartenders | \$8.61 | \$6.99 | \$7.89 | \$9.33 |
| Sec. school teachers, except special & voc. ed. | - | - | - | - |
| General & operations managers | \$33.23 | \$20.40 | \$27.74 | \$41.19 |
| Elem. school teachers, except special ed. | - | - | - | - |
| Dishwashers | \$7.03 | \$5.91 | \$6.47 | \$7.34 |

Door County is part of an area which includes Door, Florence, Forest, Green Lake, Kewaunee, Langlade, Marquette, Menominee, Oconto, Shawano and Waushara counties.

Employment and Wages

Average annual wages are determined by using the total annual wages paid by an industry divided by the average number of employees. They do not reflect average hourly wages, or the number of hours worked. This definition may explain why the average annual wage in Door County is relatively low when compared to the state. Wages also are generally lower in non metropolitan counties.

The county relies heavily on seasonal employment as it is one of the top tourism areas in Wisconsin, ranking seventh statewide in tourism dollar expenditures. It should be noted that wages in the leisure and hospitality industry were the wages above the statewide counterpart's average wage. Nearly 24 percent of the total wages in the county came from the leisure and hospitality industry. This industry also provides nearly 3,100 jobs in the county.

While tourism is important to the county's economy, it

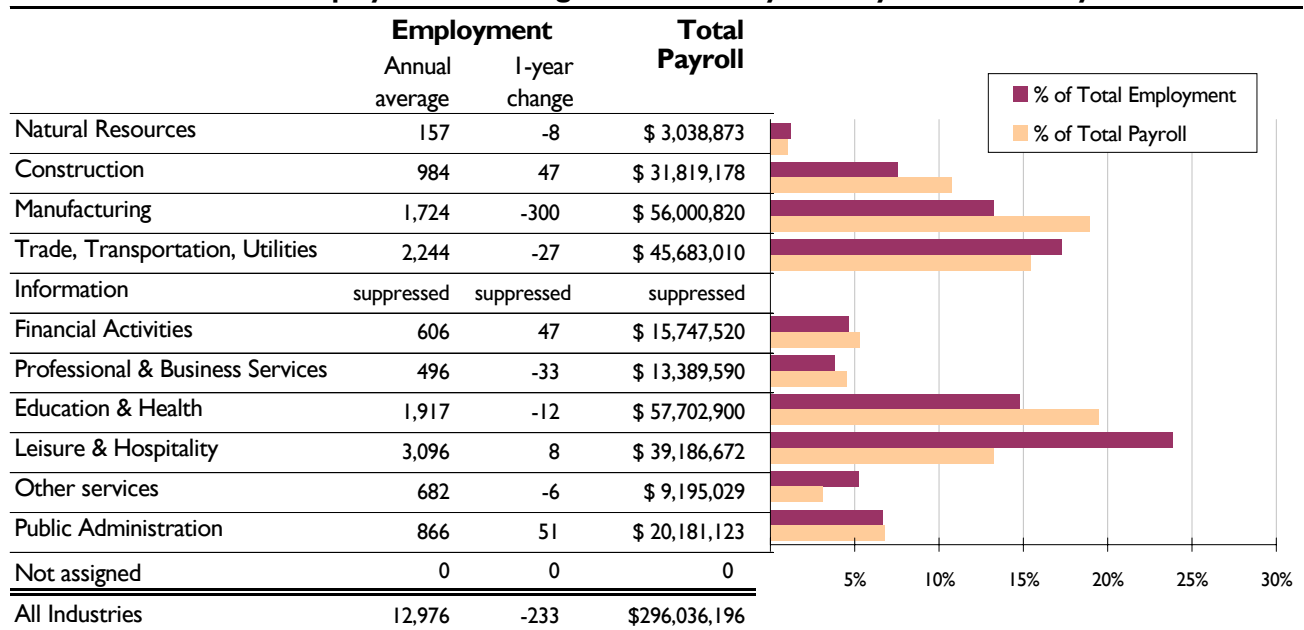
Average Annual Wage by Industry Division in 2003

| | Average Annual Wage | | Percent of | 1-year |
|----------------------------------|---------------------|-------------|------------|------------|
| | Wisconsin | Door County | Wisconsin | % change |
| All Industries | \$ 33,423 | \$ 22,814 | 68.3% | 1.1% |
| Natural resources | \$ 25,723 | \$ 19,356 | 75.2% | 4.2% |
| Construction | \$ 40,228 | \$ 32,337 | 80.4% | -1.1% |
| Manufacturing | \$ 42,013 | \$ 32,483 | 77.3% | 1.0% |
| Trade, Transportation, Utilities | \$ 28,896 | \$ 20,358 | 70.5% | 3.4% |
| Information | \$ 39,175 | suppressed | Not avail | Not avail. |
| Financial activities | \$ 42,946 | \$ 25,986 | 60.5% | 3.8% |
| Professional & Business Services | \$ 38,076 | \$ 26,995 | 70.9% | 8.9% |
| Education & Health | \$ 35,045 | \$ 30,101 | 85.9% | 2.1% |
| Leisure & Hospitality | \$ 12,002 | \$ 12,657 | 105.5% | 3.8% |
| Other services | \$ 19,710 | \$ 13,482 | 68.4% | -5.9% |
| Public Administration | \$ 35,689 | \$ 23,304 | 65.3% | -0.8% |

Source: WI DWD, Bureau of Workforce Information, Quarterly Census of Employment & Wages

should also be noted that other industries are also important to the county. Manufacturing has the highest average annual earnings of all the industries in the county at \$32,483, followed very closely by the construction industry. While manufacturing employment has declined, it provides the second largest portion of wages in the county's economy behind the education and health industry. Manufacturing ranks fourth in number of employees in the county.

2003 Employment and Wage Distribution by Industry in Door County



Source: WI DWD, Bureau of Workforce Information, Quarterly Census Employment and Wages, June 2004

Per Capita Personal Income

Per capita personal income (PCPI) includes income from wages and self-employment, assets (dividends, interest, rent) and transfer payments (social security, insurance, welfare, pensions) divided by mid-year total population estimates.

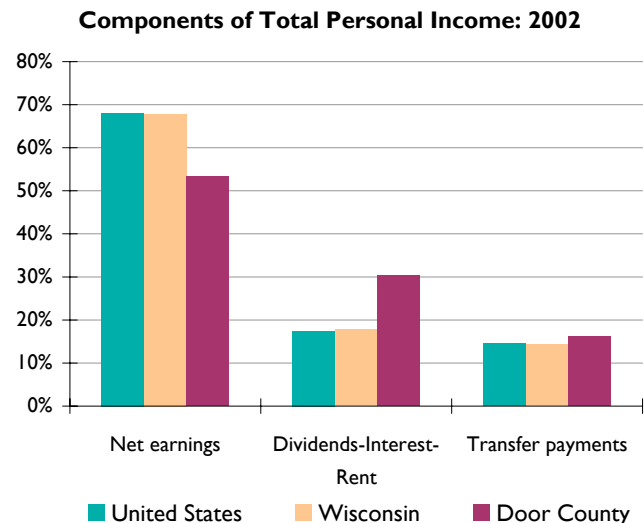
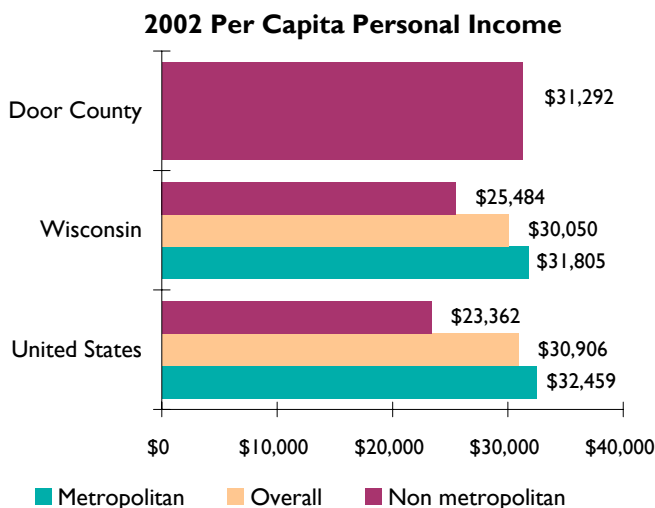
The majority of PCPI in Door County comes from net earnings, with smaller percentages coming from dividends, interests payments and transfer payments. The percent from net earnings is lower than the state and

national average. This is offset with a greater percentage coming from the other two sources, primarily interest, dividends and rent. This is consistent with an older population in the county.

PCPI in the county was \$31,292. The PCPI was above the state and national levels. The growth rate for the county's PCPI was above both the state and nation.

| | Per Capita Personal Income | | | | | | Percent Change | |
|---|----------------------------|----------|----------|----------|----------|----------|----------------|--------|
| | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 1 year | 5 year |
| United States | \$25,334 | \$26,883 | \$27,939 | \$29,847 | \$30,527 | \$30,906 | 1.2% | 22.0% |
| Wisconsin | \$24,514 | \$26,175 | \$27,135 | \$28,573 | \$29,361 | \$30,050 | 2.3% | 22.6% |
| Non-metropolitan WI | \$20,734 | \$22,195 | \$22,900 | \$24,059 | \$24,833 | \$25,484 | 2.6% | 22.9% |
| Door County | \$23,972 | \$26,448 | \$27,851 | \$29,126 | \$30,114 | \$31,292 | 3.9% | 30.5% |
| In current dollars (adjusted to U.S. CPI-U) | | | | | | | | |
| United States | \$28,397 | \$29,670 | \$30,170 | \$31,181 | \$31,010 | \$30,906 | -0.3% | 8.8% |
| Wisconsin | \$27,478 | \$28,889 | \$29,301 | \$29,850 | \$29,825 | \$30,050 | 0.8% | 9.4% |
| Non-metropolitan WI | \$23,240 | \$24,497 | \$24,728 | \$25,135 | \$25,226 | \$25,484 | 1.0% | 9.7% |
| Door County | \$26,869 | \$29,190 | \$30,074 | \$30,429 | \$30,590 | \$31,292 | 2.3% | 16.5% |

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, May 2004



Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System, May 2004

The county workforce profiles are produced annually by the Office of Economic Advisors in the Wisconsin Department of Workforce Development. The author of this profile and regional contact for additional labor market information is:

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Sheboygan, WI 53081
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email: Richard.Seidemann@dwd.state.wi.us

Metropolitan Statistical Area (MSA) - A single county or group of counties that include at least one urbanized area with a minimum population of 50,000. Multiple-county MSAs have a central county or counties, which have a high degree of social and economic integration with the other member counties as measured by commuting data.

Non-metropolitan county - Any county that is not a member of a metropolitan statistical area.

Net Migration - One of two components of population change. It is the net result of individuals who either moved into or out of an area.

Natural Change - One of two components of population change. It is the result of the number of births minus the number of deaths in an area over a period of time. A natural increase indicates there were more births than deaths. A natural decrease indicates there were more deaths than births.

Employed - Persons 16 years of age or older, who worked as paid employees, or worked in their own business, profession or farm, or worked 15 hours or more as unpaid workers in a family-operated enterprise. Includes those temporarily absent from their jobs due to illness, bad weather, vacation, childcare problems, labor dispute, maternity or paternity leave, or other family or personal obligations.

Unemployed - Persons 16 years of age or older with no employment, who were available for work and made efforts to find employment sometime during the previous 4-week period ending with the monthly reference week. Persons who were awaiting recall to a job did not need to look for work to be classified as unemployed.

Labor Force - The sum of the employed and unemployed, whom are at least 16 years of age and older.

Unemployment Rate - The number of unemployed divided by the labor force. It is expressed as a percentage of the labor force.

Labor Force Participation Rate (LFPR) - The labor force divided by the total population aged 16 years and older. It is expressed as a percentage of the population aged 16 years and older.

Suppressed - Data is withheld or suppressed if it does not meet certain criteria. If an industry in a county has fewer than three employers or if a single employer employs 80% or more that industry's total employment in that county then the data are suppressed. These criteria were established to maintain the confidential reporting of payroll and employment by employers.

Total Personal Income - The aggregate income of an area received by all persons from all sources. It is calculated as the sum of wage and salary disbursements (less contributions for government social insurance), supplements to wages and salaries, proprietors' income with inventory valuation and capital consumption adjustments, rental income of persons with capital consumption adjustment, personal dividend income, personal interest income, and personal current transfer receipts that include retirement and veteran's benefits, government paid medical reimbursements, and income maintenance program payments.

Per Capita Personal Income (PCPI) - Total personal income divided by the total population.

Current Dollars - Phrase used to express historical dollar values in terms of their current purchasing power via inflation adjustment.

CPI-U - Consumer Price Index for all urban consumers, the most commonly used measure of inflation in the United States.